



# GOVERNMENT OF THE DISTRICT OF COLUMBIA

## Performance Evaluation System Performance Rating Worksheet Instructions

### PURPOSE

This *Performance Rating Worksheet* is designed to assist supervisors in determining what rating they should assign their employees. These guidelines are based on the procedures in Part II of Chapter 14 of the District Personnel Manual (DPM). While it is strongly recommended that supervisors use this worksheet as they complete each employee's *Report of Performance Rating* (P.O. Form 12), its use is not required by any law or regulation.

### RATING WORKSHEET INSTRUCTIONS

1. On the *Report of Performance Rating* (P.O. Form 12), underline all of the sub-factors that are relevant to the employee's position.
2. Count the number of underlined items and write the total in box "A" of the attached Rating Worksheet.
3. On the *Report of Performance Rating* (P.O. Form 12), rate the employee's performance for each of the underlined items using the following symbols:
  - a. A plus sign (+) indicates that the employee is strong in a sub-factor.
  - b. A check sign (✓) indicates that the employee's performance is acceptable in a sub-factor.
  - c. A minus sign (-) indicates that the employee needs improvement in a sub-factor.
4. After all items have been rated, fill in the Rating Worksheet with the following figures:
  - a. Count all of the plus signs (+) and write the total in box "B" of the Rating Worksheet.
  - b. Count all of the check signs (✓) and write the total in box "C" of the Rating Worksheet.
  - c. Count all of the minus signs (-) and write the total in box "D" of the Rating Worksheet.
5. Use a calculator to figure out the following ratios:
  - a. Divide the figure in box "B" by the figure in box "A" and write the ratio in the appropriate box of the Rating Worksheet.
  - b. Divide the figure in box "C" by the figure in box "A" and write the ratio in the appropriate box of the Rating Worksheet.
  - c. Divide the figure in box "D" by the figure in box "A" and write the ratio in the appropriate box of the Rating Worksheet.
6. After calculating all of the figures in the PES Rating Worksheet, compare the ratios in the right hand column to the ratios in the Rating Guidelines table at the bottom of the page to determine the employee's overall performance rating. Examples are provided.
7. Write the employee's overall rating on the official *Report of Performance Rating* (P.O. Form 12).
8. As needed, repeat the steps above to determine the rating for each major rating factor as well:
  - a. Quantity
  - b. Quality
  - c. Work Habits
  - d. Personal Relations
  - e. Adaptability
  - f. Supervision and Planning
  - g. Other

### RATING CRITERIA AS DEFINED IN PART II OF CHAPTER 14 OF THE DISTRICT PERSONNEL MANUAL

**Outstanding:** The rating of Outstanding shall be accorded for performance which not only exceeds normal job requirements but is outstanding and deserves special recognition.

**Excellent:** The rating of Excellent shall be accorded to an employee for performance that fully meets all job requirements and is consistently superior in the major duties of the positions.

**Satisfactory:** The rating of Satisfactory shall be accorded when overall performance meets job requirements, and if performance requirements are not met, performance in other duties compensates for the deficiencies.

**Unsatisfactory:** The rating of Unsatisfactory shall be assigned for performance which fails to meet the minimum requirements of the majority of duties relating to the occupied position.



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## Performance Evaluation System Performance Rating Worksheet

PES Rating Worksheet	Totals	Ratio
Total number of rating sub-factors that are relevant to the employee's position.	A =	N/A
Total number of sub-factors that were given plus signs (+).	B =	$B \div A =$
Total number of sub-factors that were given check signs (✓).	C =	$C \div A =$
Total number of sub-factors that were given minus signs (-).	D =	$D \div A =$

### EXAMPLES

- Oscar received all plus signs (+) and did not receive any check signs (✓) or minus signs (-), therefore he should receive an "Outstanding" rating.
- Ellen received both plus signs (+) and check signs (✓), but did not receive any minus signs (-), therefore she should receive an "Excellent" rating.
- Sam's ratio of minus signs (-) is 0.33, which is between 0.01 and 0.49, therefore he should receive a "Satisfactory" rating.
- Ursula's ratio of minus signs (-) is 0.54, which is between 0.50 and 1.00, therefore she should receive an "Unsatisfactory" rating.

PES Rating Guidelines Recommended Ratios	+	✓	-
Outstanding	1.00	0.00	
Excellent	1.00		0.00
Satisfactory	0.51 - 0.99		0.01 - 0.49
Unsatisfactory	0.00 - 0.50		0.50 - 1.00